


# Developing a Successful V.I.T.A. Site

Building Partnerships  
Statewide Reservations & Scheduling  
Mobile V.I.T.A. Outreach  
Economic Development



WEST VALLEY CITY  
Unity Pride Progress



# Partnerships

## Local Coalition



# G.A.I.N. Mission Statement

The Growing Assets and Income Now (GAIN) Coalition is a community based partnership consisting of non-profit organizations, businesses, educational institutions and government agencies who are committed to providing low-income households in the Greater Salt Lake area the opportunity to better their life.

# G.A.I.N. Mission Statement

The basic goals of the coalition:

1. Awareness and Education –
2. Free Tax Preparation –
3. Financial Education and Asset Building –



# G.A.I.N. Coalition Members

## Growing Assets & Income Now Coalition Serving Salt Lake County

- **Government Agencies**
  - West Valley City
  - Salt Lake County
  - State of Utah, DWS
- **Colleges and Universities**
  - University of Utah
  - Utah State University Extension Service

# G.A.I.N. Coalition Members

- Financial Organizations
  - Zions Bank
  - Wells Fargo Bank
  - American Express
  - U.S. Bancorp
- Internal Revenue Service



# G.A.I.N. Coalition Members

- **Non-Profit Agencies**
  - Community Services Council
  - Community Action Agency
  - United Way of Utah
  - 211 Infobank
  - Utah Saves
  - AAA Fair Credit Foundation
  - Utah Individual Development Account Network
  - Utah Issues

# Community & Businesses

- **Solicit Business Services / donations**
  - Office Supplies
  - Volunteers
  - Food for V.I.T.A. Events
  - Products / Services for Volunteer Awards
  - Have them hang posters / banners and pass out brochures at their location, promoting your V.I.T.A. site.





# Partnerships

## Community & Business Resources

# Community & Businesses

- Use direct mailers and newsletters to Weed & Seed / CDBG areas explaining V.I.T.A. and other program offerings
- Use Local or State Government Mailings to save money.
- Solicit Apartment Managers and have them help promote your site.
- Solicit Churches for Volunteers and to promote your site.



A scenic view of a waterfall cascading down a rocky cliff in a forested valley. The water is white and frothy as it falls, creating a misty spray at the base. The surrounding cliffs are dark and rugged, covered in dense evergreen forests. The sky is a deep blue, and the overall atmosphere is serene and majestic.

# **West Valley Community Center**

## **Our Direct Partners**

# WVCC V.I.T.A Partners

- Wells Fargo Bank (Intake & New Accounts)
- Clearfield Job Corp Center
- Catholic Community Services
- Salt Lake County Parks and Rec.
- Family Support Services
- West Valley City Housing Authority
- Utah Non-profit Housing Corp.
- Sanderson Center for the Deaf
- U.S. Forest Service National Imaging Center



# WVCC V.I.T.A. Partners

- G.A.I.N. Coalition
- Granger Christian Church
- West Valley City
- American Express
- Cricket Communications
- Fox13 News
- Salt Lake Tribune
- West Valley City Public Access CH17
- West Valley Journal



# Volunteers

## Recruiting Ideas



# Volunteers

- **Require mandatory Staff Participation**
- **Solicit Local Churches**
- **Use Partner Organizations**
- **Past Program Recipients (Keep List)**
- **Americorp / VISTA**
- **Local Private Schools and Universities**
- **Courts (DUI and other minor offences)**
- **Solicit Local Businesses**

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# Media & Public Affairs

## West Valley City, Promotion



# Media and Public Affairs



-Dennis Nordfelt  
Mayor

- **Quarterly Mayors Message**
- **Kick-off events and Open Houses**
- **Media Interviews**
- **Access to City Facilities and Resources**
- **Employee Participation**

# Media and Public Affairs

## Free Income Tax Preparation for households earning less than \$35,500

Free, confidential tax preparation assistance from trained volunteers is available through the Volunteer Income Tax Assistance (VITA) program.

For more information about VITA, dial 2-1-1.



West Valley City Channel 17 [www.ci.westvalleycity-ut.gov](http://www.ci.westvalleycity-ut.gov)



# Media and Public Affairs

## The Salt Lake Tribune

<http://www.sltrib.com>

Article Last Updated: 3/04/2006 12:28 PM

### Volunteers spread word on tax credits

Cutting the pinch: The complicated process of finding loopholes can be well worth the effort

By Pamela Manson  
The Salt Lake Tribune  
Salt Lake Tribune

In 2003, more than a third of Utahns who were eligible to take an Earned Income Tax Credit (EITA) instead left the money in the federal treasury, the highest percentage of nonclaimants in the nation.

This year, several groups hope to shrink that number with the Volunteer Income Tax Assistance Program, or VITA, which offers help to low- and moderate-income wage earners with household incomes of less than \$37,000. Utahns lost about \$81 million by not taking the EITC for tax year 2002, the most recent year figures are available.



# Financial Literacy

Ideas for your site



# Financial Literacy

- FDIC Software
- Urban Tech Financial Literacy Programs
- IDA Financial Literacy Requirements
- Local Banks and Credit Unions
- Non-profit credit counseling services




# Break Time! 5-Min



Coming up next:

**Utah Statewide  
Reservation & Scheduling  
System**





# Reservations & Scheduling

Utah 211 Infobank  
AAA Fair Credit Foundation

# V.I.T.A. Appointment Scheduling

## Need Answers? Need help? Dial 2-1-1.

211 Info Bank, a program of Community Services Council, is a free information and referral line for health, human and community services. 211 provides information and referral on topics such as emergency food pantries, rental assistance, public health clinics, child care resources, support groups, legal aid, and a variety of non-profit and governmental agencies.

### Updated Resource lists are now available!

[Click here](#) to browse our updated resource lists, including youth, general, and homeless resource lists. Each list can be printed, and circulated as needed.

### 2 new resource lists are available for energy saving tips.

[Energy Conservation Tips](#)  
[Simple Draft Stopper](#)  
[Press Release](#)

### A new resource website is available for caregivers.

[www.ucare.utah.gov](http://www.ucare.utah.gov)



## Community Resource Alerts:

### The 2005-06 Human Services Directory is available!

>> Buy your copy today! <<

### 211 Info Bank expands services statewide.

As of February 11, 2005 the 3-digit dialing code, 2-1-1, can now be accessed from anywhere in the state of Utah.

### Dial 2-1-1 for more information.

### 2005 Volunteer Income Tax Assistance (VITA)

The VITA program assists individuals or families whose income is approximately below \$37,000 a year to e-file their simple tax returns. A goal of VITA is to assure those applicable claim the Earned Income Tax Credit (EITC) which can bring them up to \$4,400. The 211 Info Bank is setting up appointments or providing information on walk-in VITA sites.

>> Call 2-1-1 to find a VITA site <<




# V.I.T.A. Appointment Scheduling

AAA Fair Credit Foundation - Login - Mozilla Firefox

File Edit View Go Bookmarks Tools Help

http://faircredit.org/vita/template\_scheduler.asp?id=2

Customize Links Free Hotmail Windows Marketplace Windows Media Windows

 AAA FAIR CREDIT FOUNDATION

**VITA Site Scheduling Manager**

**Login**

User Name:

Password:

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# V.I.T.A. Appointment Scheduling



AAA FAIR CREDIT  
FOUNDATION

## VITA Site Scheduling Manager

*Scheduler Home*

### *Scheduler Home*

#### *Resources*

Find Sites  
Manage Users  
Technical Support  
Manage Sites  
Search for Appointment

#### *Message Center*

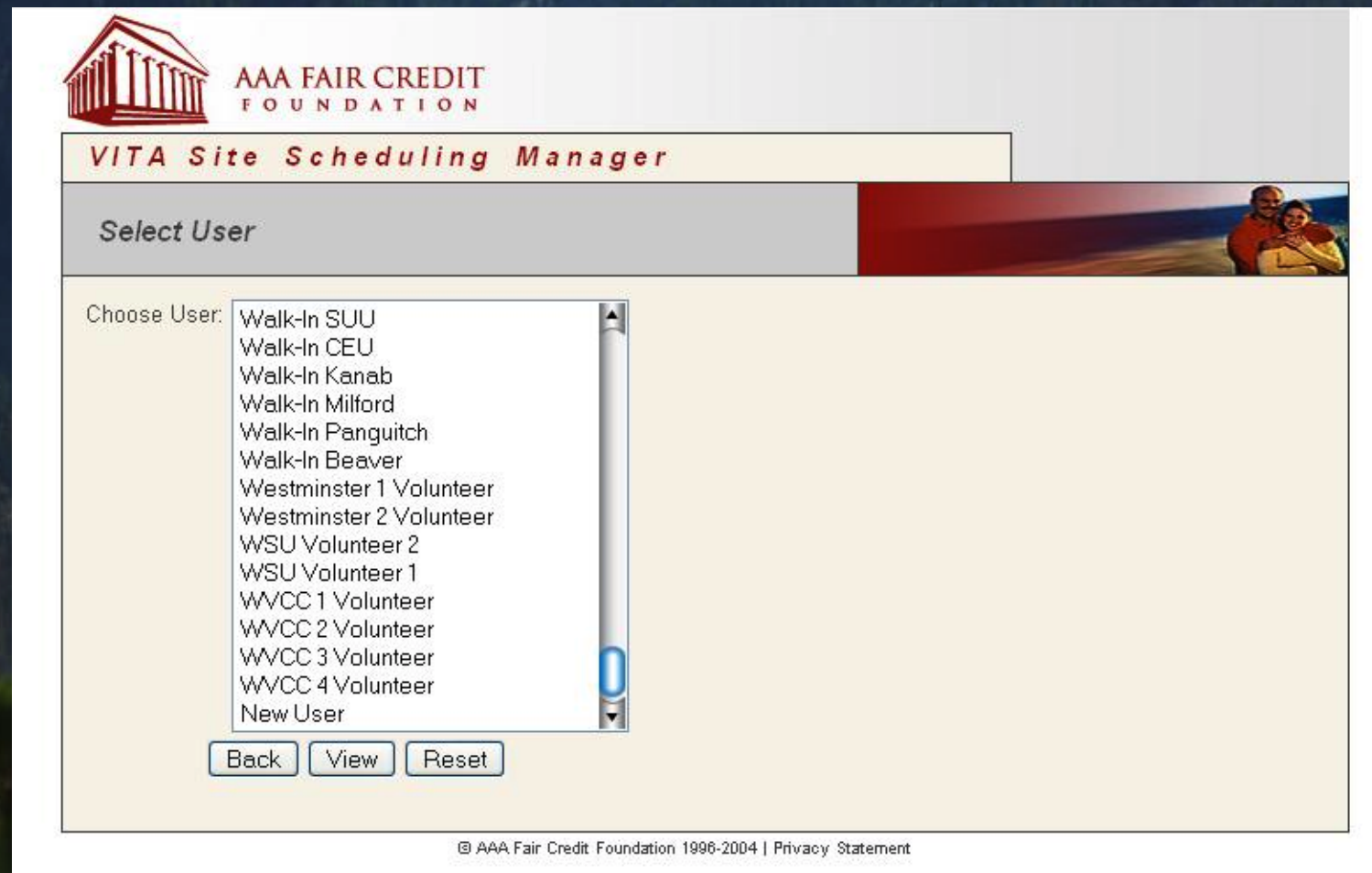
#### *Calendars*

My Appointments

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# V.I.T.A. Appointment Scheduling



The screenshot shows a web application titled "VITA Site Scheduling Manager" for the "AAA FAIR CREDIT FOUNDATION". The page has a header with the foundation's logo and name. Below the header, there is a section titled "Select User" with a background image of a family. Under this section, there is a "Choose User:" label followed by a scrollable list of user roles. The list includes various walk-in and volunteer positions at different locations. At the bottom of the list are three buttons: "Back", "View", and "Reset". A copyright notice is visible at the very bottom of the page.

AAA FAIR CREDIT FOUNDATION

**VITA Site Scheduling Manager**

Select User

Choose User:

- Walk-In SUU
- Walk-In CEU
- Walk-In Kanab
- Walk-In Milford
- Walk-In Panguitch
- Walk-In Beaver
- Westminster 1 Volunteer
- Westminster 2 Volunteer
- WSU Volunteer 2
- WSU Volunteer 1
- WVCC 1 Volunteer
- WVCC 2 Volunteer
- WVCC 3 Volunteer
- WVCC 4 Volunteer
- New User

Back View Reset

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# V.I.T.A. Appointment Scheduling



AAA FAIR CREDIT  
FOUNDATION

## VITA Site Scheduling Manager

### Select Site



Choose Site:

- The Grand Center
- Tooele VITA Site @ Salt Lake Community College
- University of Utah
- USU - Uintah Basin Branch Campus
- USU Extension Service of Summit County
- USU Extension Service of Uintah County
- USU Extension Service of Wasatch County
- USU Extension Services of Juab County
- USU Extension Services of Washington County
- Utah State Univ Ex of Washington Cnty
- Utah State University (USU)
- Weber State University
- West Valley Community Center**
- Westminister College
- New Site

Back

View

Reset

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# V.I.T.A. Appointment Scheduling



AAA FAIR CREDIT  
FOUNDATION

## VITA Site Scheduling Manager

### Site Info



Site Name:


Address:

City:

State:

Zip:

Phone:

Site Type:  


Appointments: Yes ☒ No ☐

Spanish: Yes ☒ No ☐

Active: Yes ☐ No ☒

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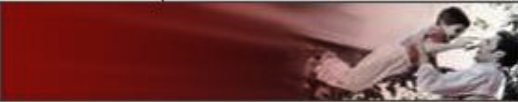
# V.I.T.A. Appointment Scheduling



AAA FAIR CREDIT  
FOUNDATION

VITA Site Scheduling Manager

Schedule



Saturday, December 30, 1899

Hour
12:00 AM
01:00 AM
02:00 AM
03:00 AM
04:00 AM
05:00 AM
06:00 AM
07:00 AM
08:00 AM
09:00 AM
10:00 AM
11:00 AM
12:00 PM



# V.I.T.A. Appointment Scheduling

- For more information about Utah's V.I.T.A scheduling system, contact Preston Cochran  
AAA Fair Credit Foundation  
230 West 200 South, Suite 3104  
Salt Lake City, UT 84101  
Phone (801) 656-1600  
Email: [preston@faircredit.org](mailto:preston@faircredit.org)
- [www.faircredit.org](http://www.faircredit.org)



# Mobile VITA Outreach

Taking VITA to those  
who cannot come to you!



# Mobile V.I.T.A. Outreach

- Find a need
  - Domestic Violence Shelters
  - Deaf and Blind Centers
  - Homeless Resource Centers & Shelters
  - Remote areas of the community
- Schedule early, schedule late
  - Most people want refund ASAP
  - Procrastinators wait until the last minute

# Mobile V.I.T.A. Outreach

- **Equipment**
  - Laptops
  - Network Switch with cables
  - Power strips and extension cords
  - Networked or Shared Printer
  - Laptop configured as a server (dedicated)
  - Internet Access optional
  - Laptop and security cable locks



# Mobile V.I.T.A. Outreach

- **Equipment**
  - Plastic storage tubs
  - VITA forms Brochures Manuals Folders
  - Extra Paper and Printer Toner/Ink
  - Extra Paper and Printer Toner/Ink
  - Extra Paper and Printer Toner/Ink
  - Clipboard and Pens, Lots of Pens
  - Hand Carts

# Mobile V.I.T.A. Outreach

- For more information on Mobile V.I.T.A. solutions contact:  
John Udseth  
West Valley Community Center  
3818 W. 4700 S.  
West Valley City, UT 84118  
Phone: (801) 403-5330  
Email: [judseth@infominetech.net](mailto:judseth@infominetech.net)



A scenic view of a waterfall cascading down a rocky cliff in a forested mountain valley. The water is white and frothy as it falls, creating a misty spray at the base. The surrounding cliffs are steep and covered in dense evergreen forests. The sky is a deep blue, and the overall atmosphere is serene and majestic.

# Economic Development

V.I.T.A the key to sustainability

# Economic Development And Sustainability

- Municipalities receive 1/3 or more of their revenue from sales taxes
- VITA patrons spend locally
- Unrealized Tax Revenue
- Many unaware of EIC
- Savings from filing fees kept local
- VITA = Sustainability



# West Valley City Stats

- WVCC & Redwood Sites
- Returns (E-File Only): 1298
- EIC: \$665,613.00
- Refunds: \$1,584,553.00 (Federal)
- Filing Savings \$389,400.00 (est)\*
- 20% increase in returns over 2004

Figures as of 5/10/06

\* Estimated at \$300 Average Prepares  
Fee Per Return (Source IRS-Phoenix)



# Q & A



# Presentation Materials



Copies of this presentation and supporting documents are available online at:  
[www.infomineotech.net](http://www.infomineotech.net) Click on the VITA link.